

1	.....	1
1.1	.....	1
1.2	.....	4
2	.....	8
2.1	.....	8
2.2	.....	8
2.3	.....	9
2.4	.....	10
2.5	.....	10
2.6	.....	11
3	.....	12
3.1	.....	12
3.2	.....	14
3.3	.....	15
4	2016	16
4.1	.....	16
4.2	.....	16
4.3	.....	17
4.4	.....	17
4.5	.....	18
5	2017	19
5.1	.....	19
5.2	.....	19
5.3	.....	20
5.4	.....	21
6	2016	23
6.1	.....	23
6.2	.....	24

6.3	.....	25
7	2017	..... 26
7.1	.....	26
7.2	.....	27
8	.....	29
8.1	.....	30
8.2	.....	31
8.3	.....	34
8.4	.....	34
8.5	.....	36
9	.....	38
	.....	39

2014 6

2017 5

			2000	6
	2006		16	
	01 02		03	
	2011	1		
			2014	6
2016				
	2017		2016	
	4335.5		20.1%	
	2015-2016			
24.1%		13.03%		25.1%

			2016	1644.3
	2015	1325.0	24.1%	
		247.3	1:6.65	
			27.82%	IC Insights 2016
Fabless		889	1999	2016
			CAGR	44.91%
	2030	5		
			30	
	70			¹
	2015			14.1
0.52		3.67	2020	32.44
		1.24	8.82	2030
	90		4.53	28.75
2030			75.9	4.01
	25.08		²	

2011

2014

2015

9

17

2016 6

2016-2017

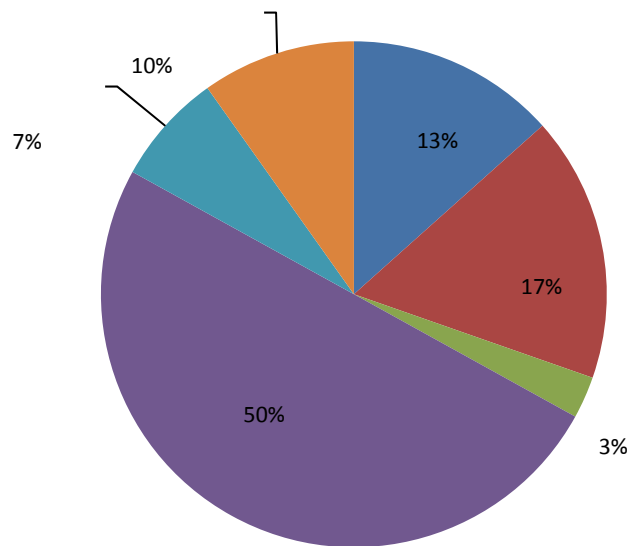
100

600

50%

13%

34%



Service

Fabless

IC

Design

59%

58%

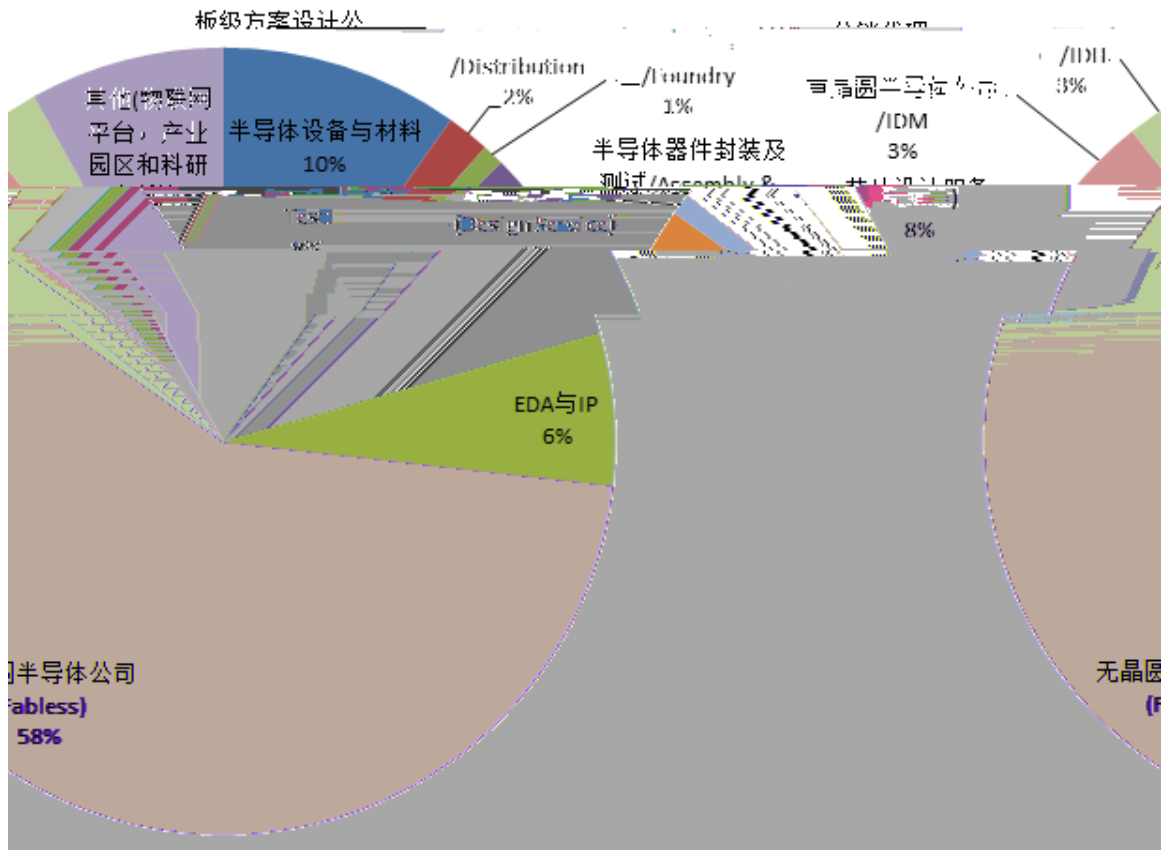
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2001

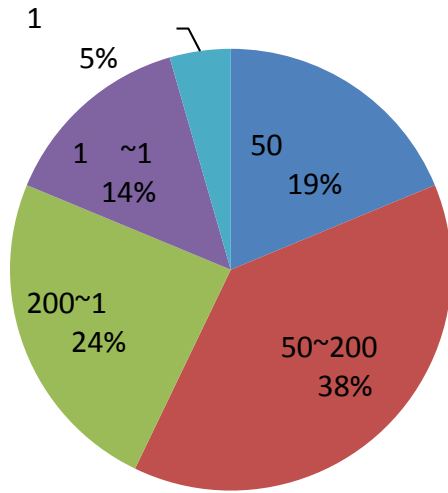
IC

20%

10 3



50-200	38%	200-1000	
24%	1000-10000	14%	50
19%			



29% 28%

16% 11%

3% 4%

30.4% 17.9% 13.4%

“

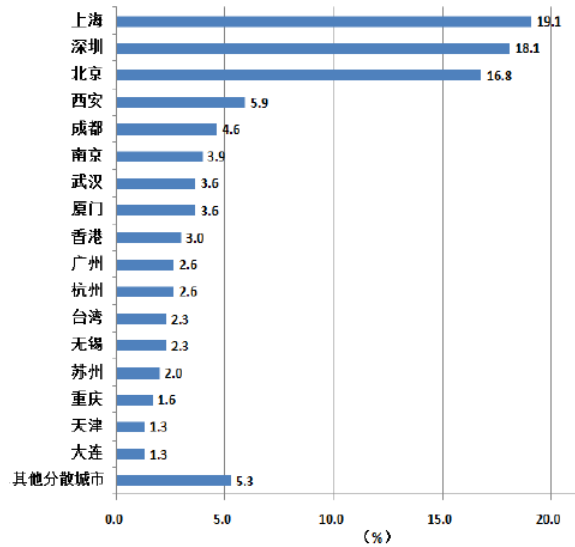
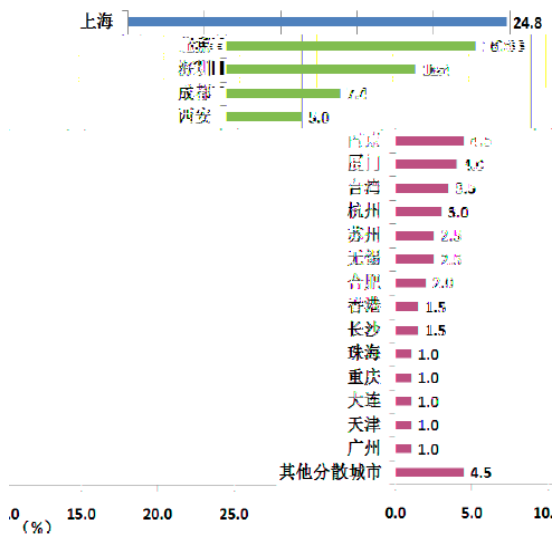
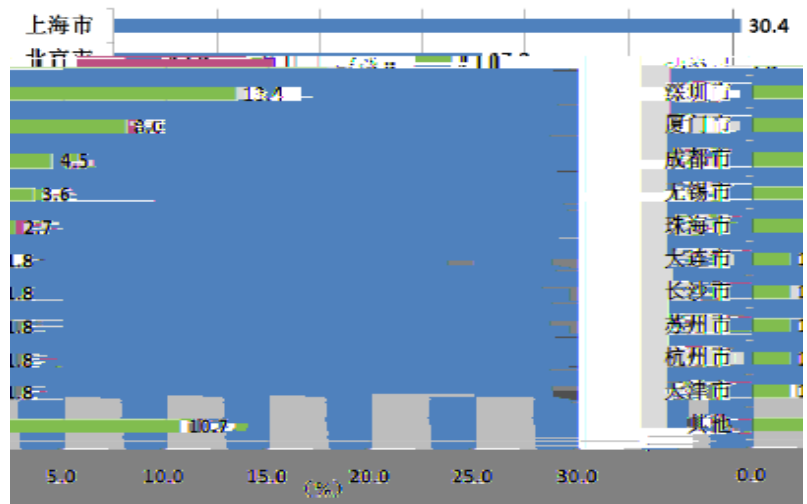
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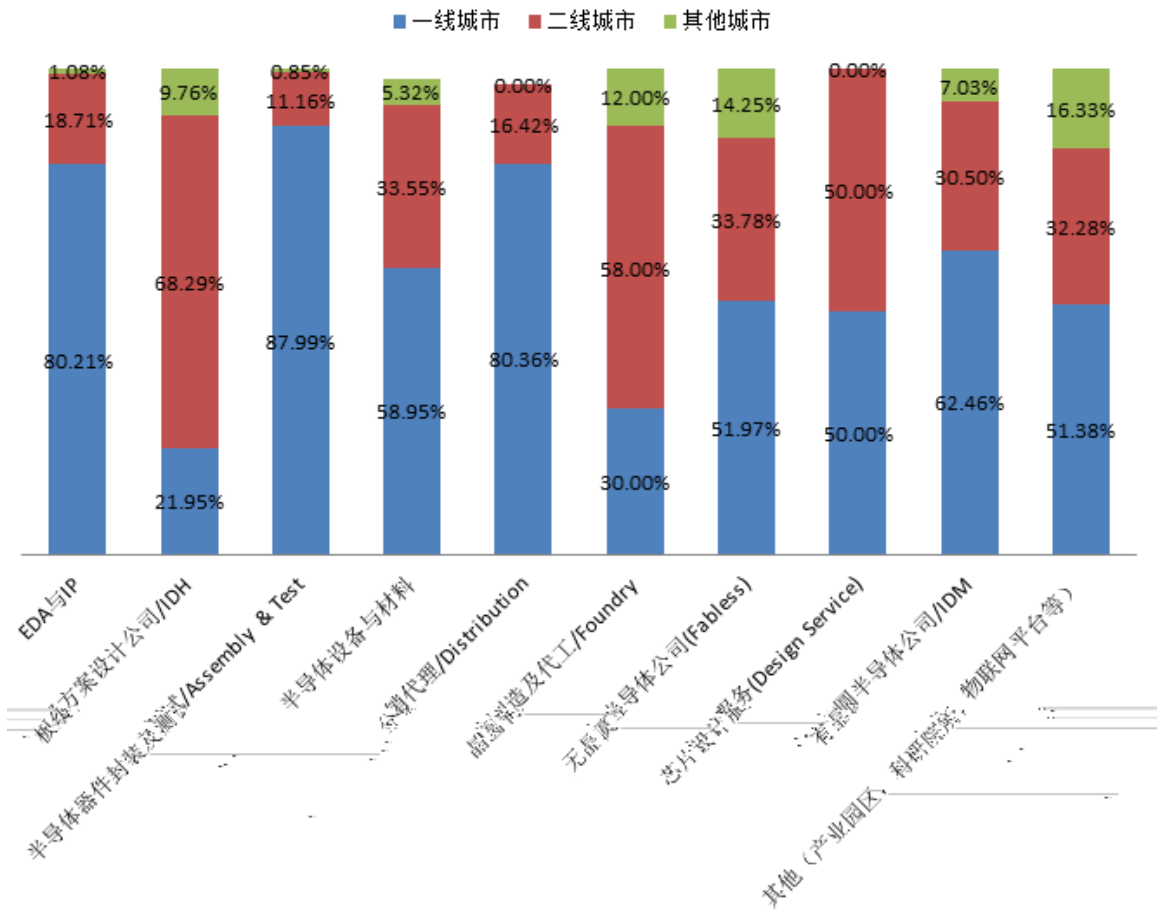
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IDM

45.7% 71% 54.9%

IC

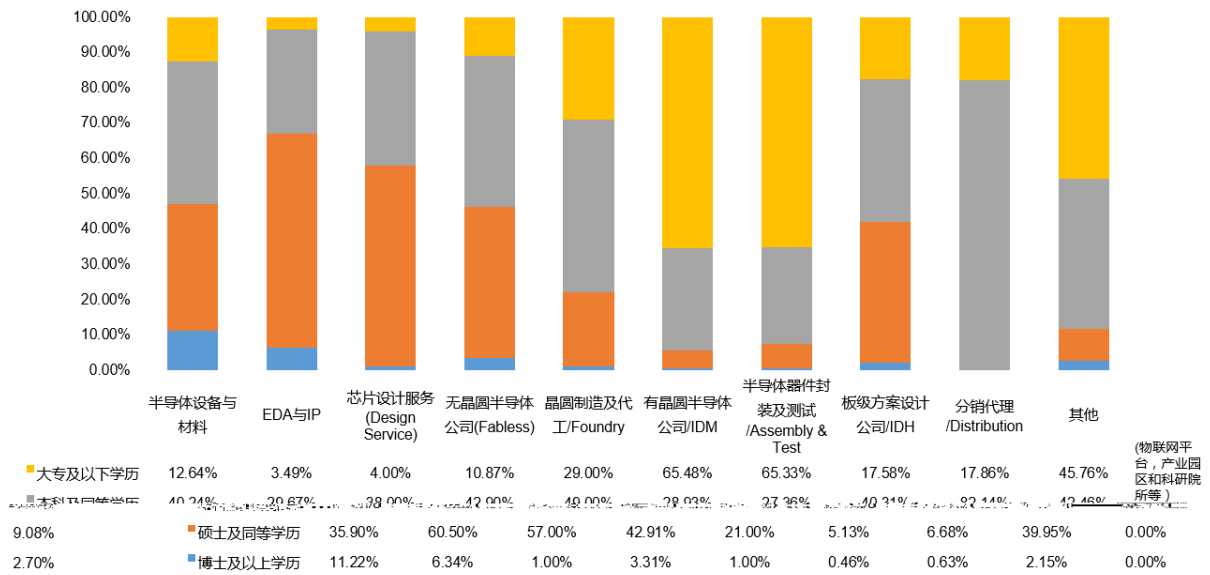
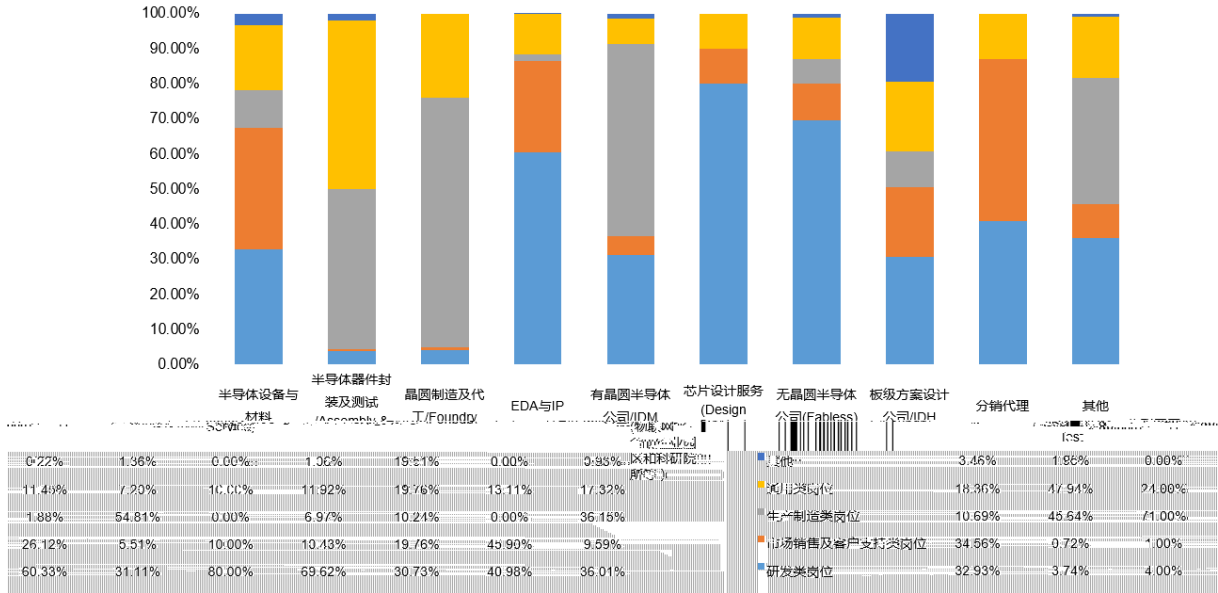
Fabless

Design Service

EDA

IP

60%



IC

EDA IP

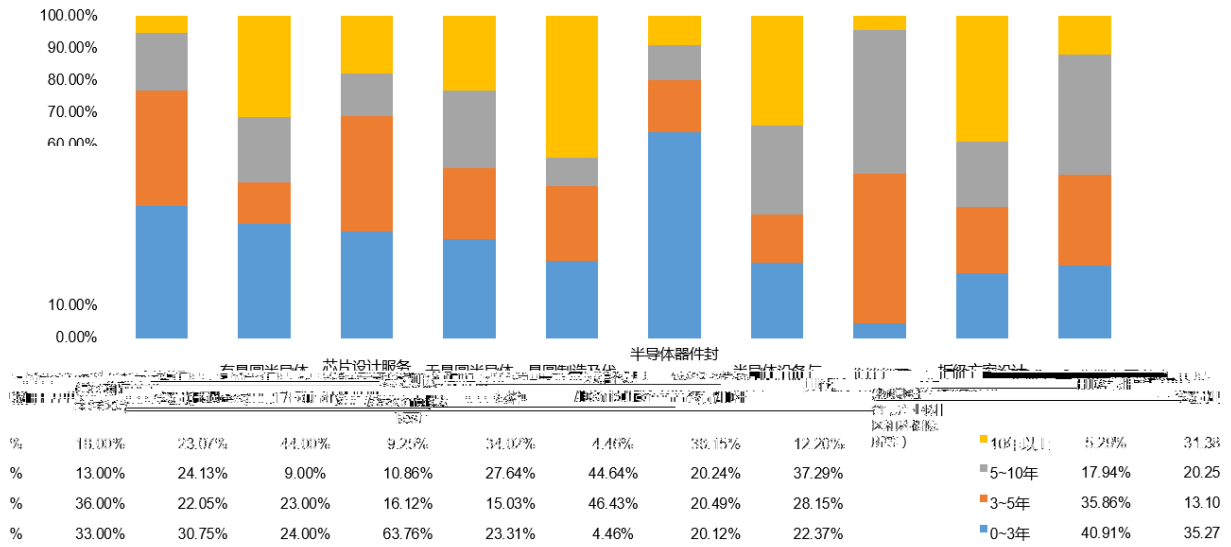
Foundry IDM

10

33%

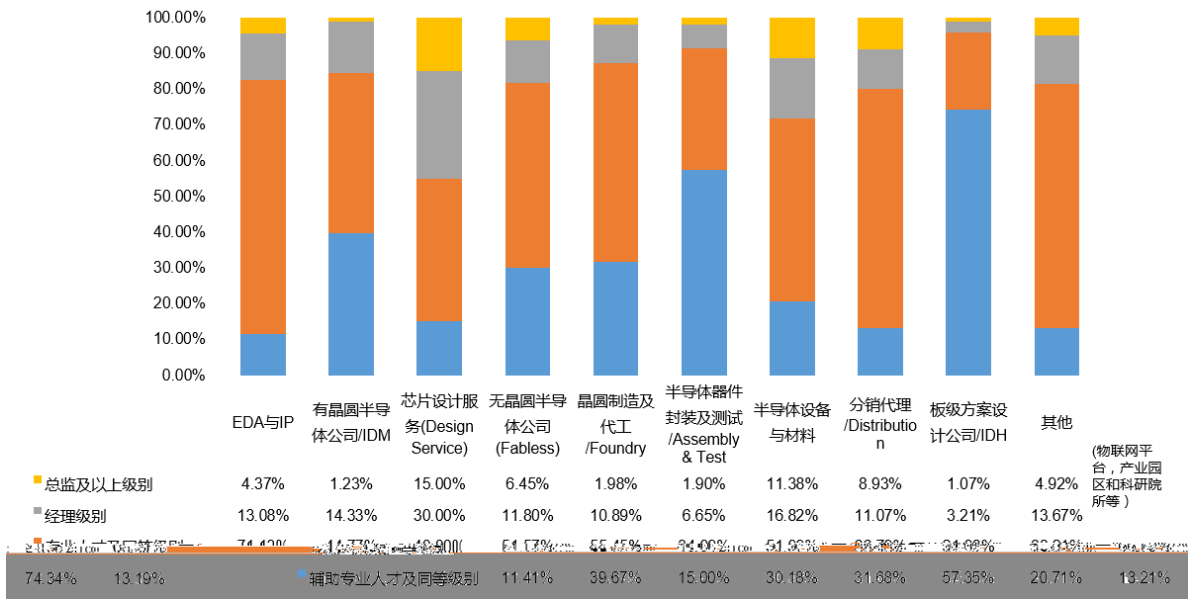
3

63.8%



EDA

57.3% 74.3%

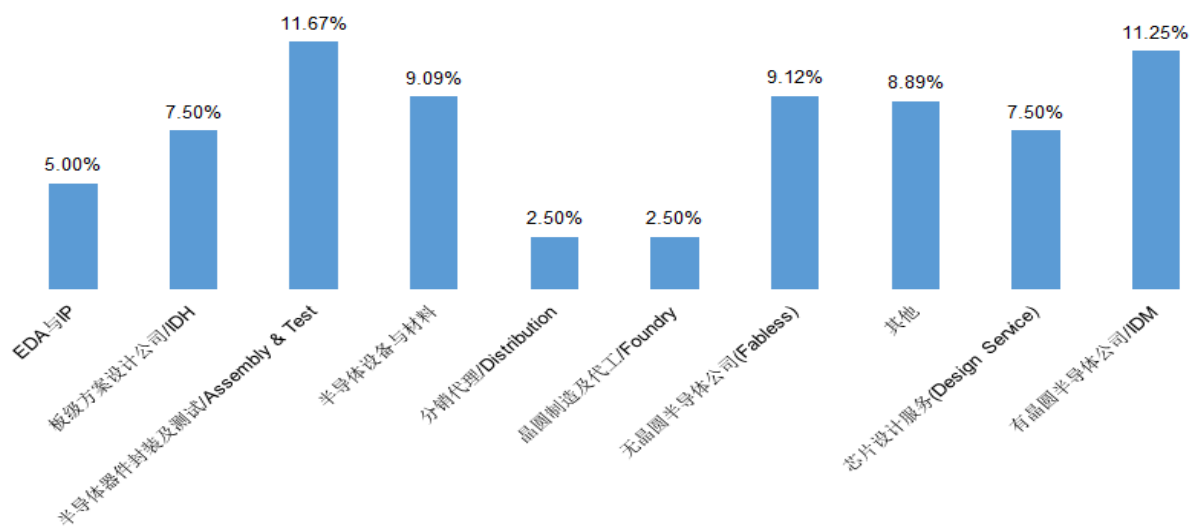


11.67%

2.5%

EDA IP

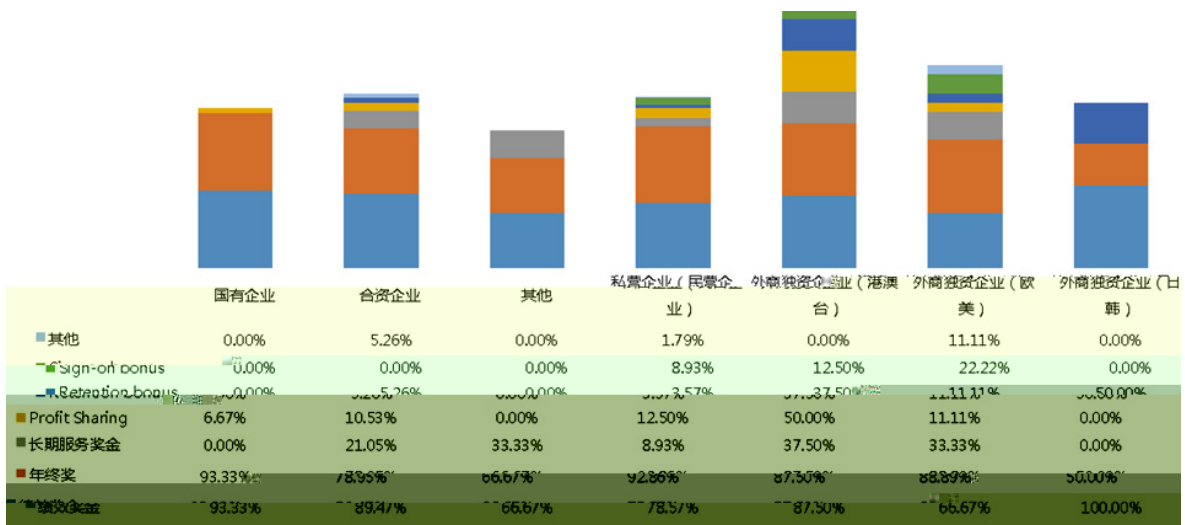
8%



96%

89%

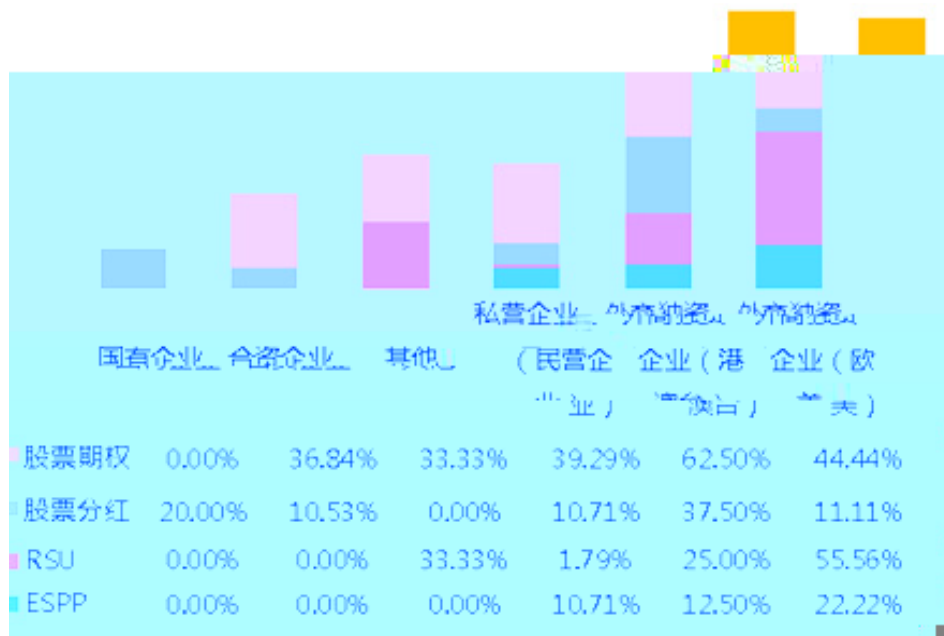
86%



93.3%

30%

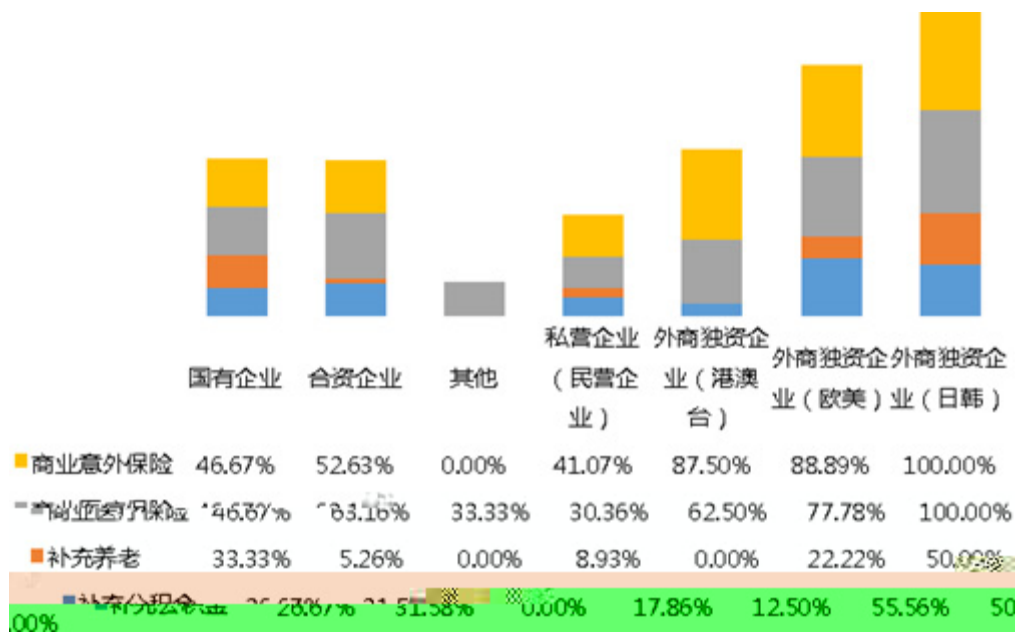
RSU ESPP



50%

30%

30%



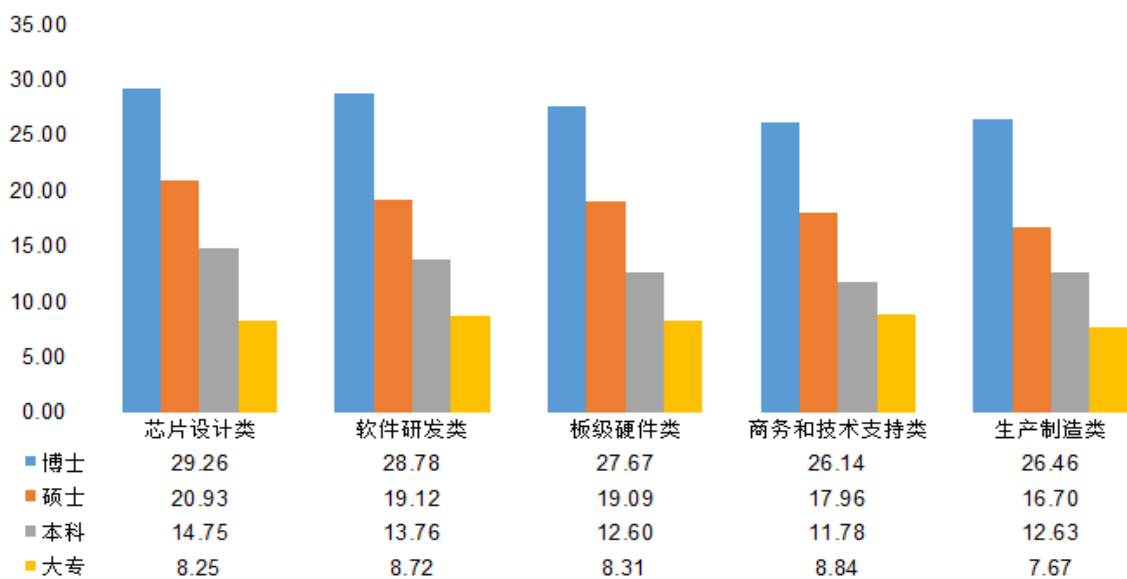
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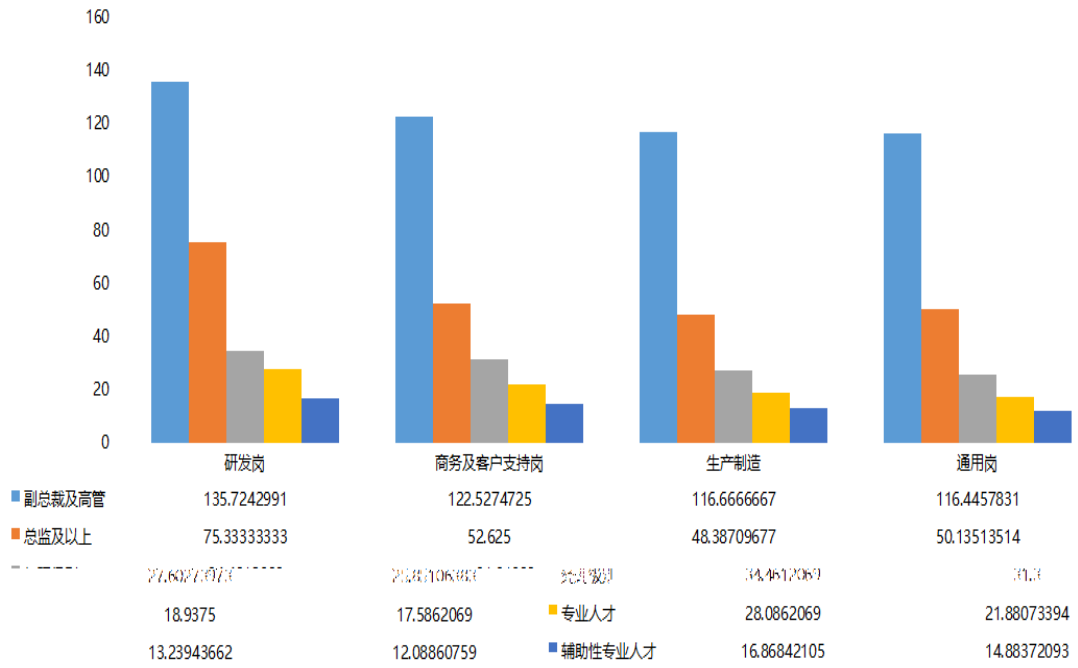
1

6

5%

10%

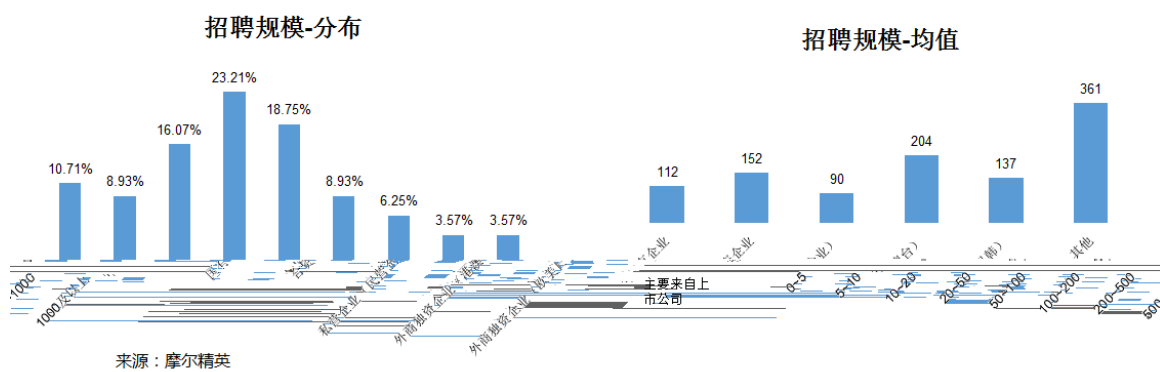




2016

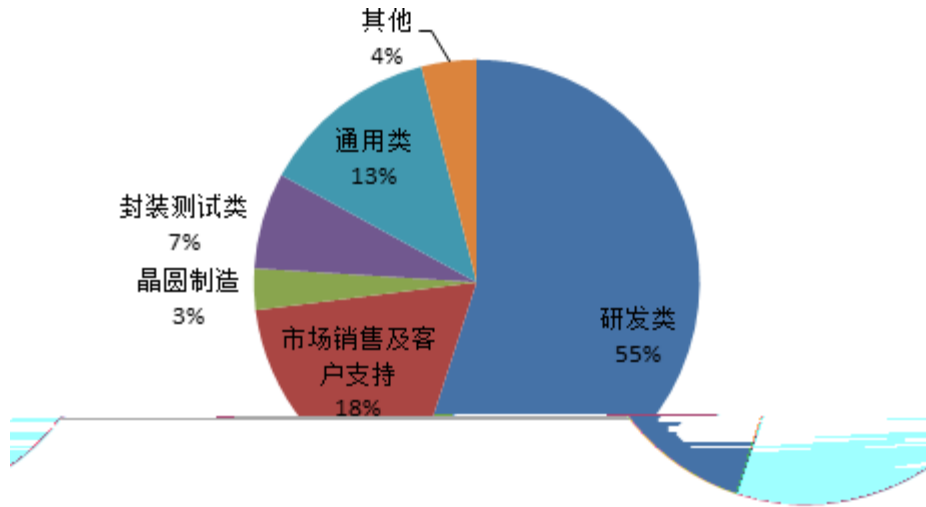
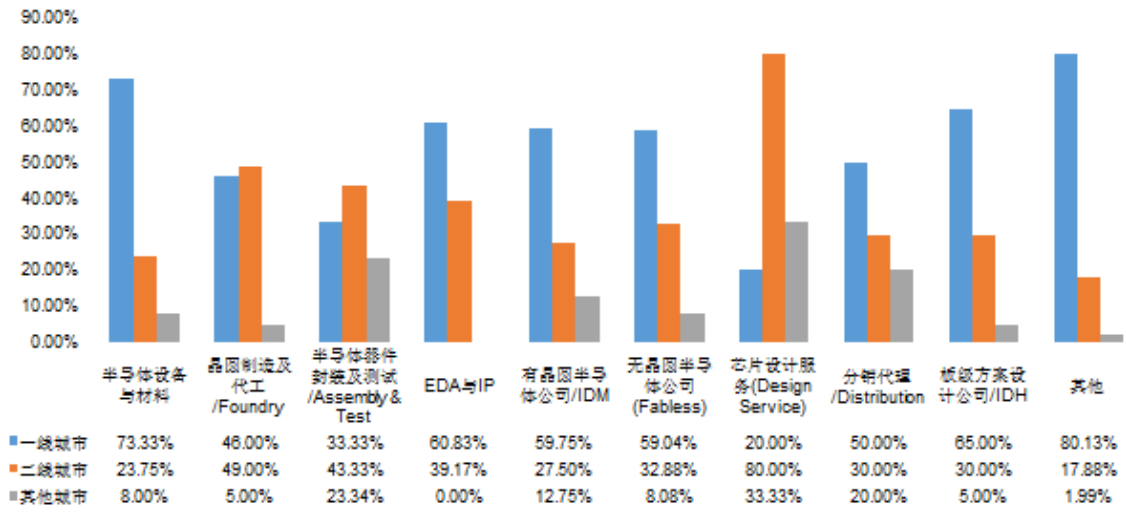
10 100

58%



23.37%

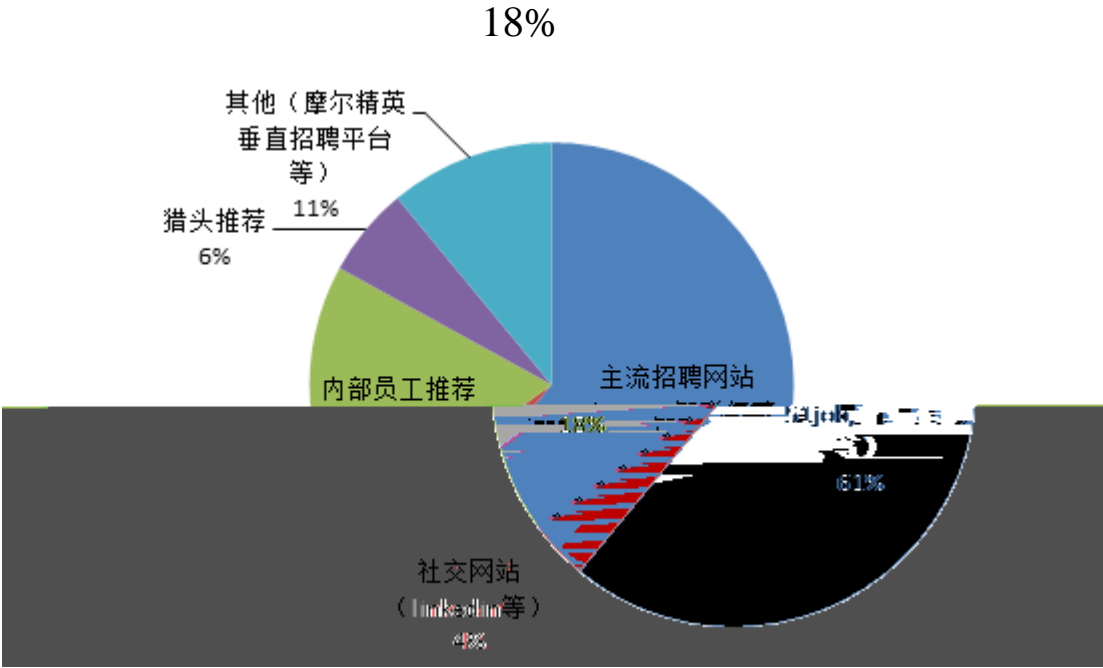
76.63%



55%

18%

61%



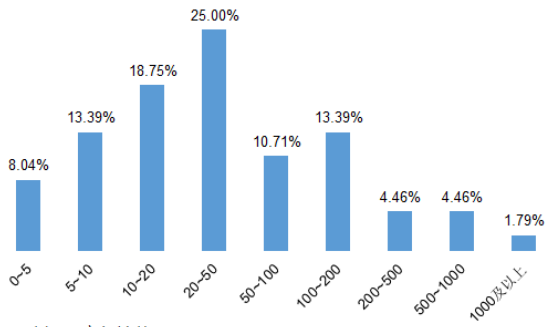
72%

45.4%

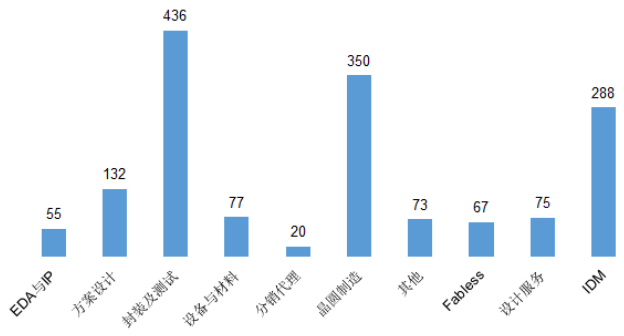
20 50
2016

3

2017 招聘规模-分布



2017 招聘均数-产业链环节



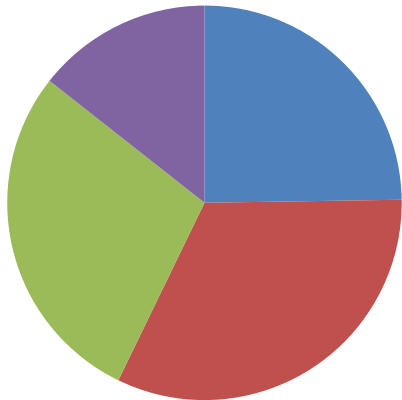
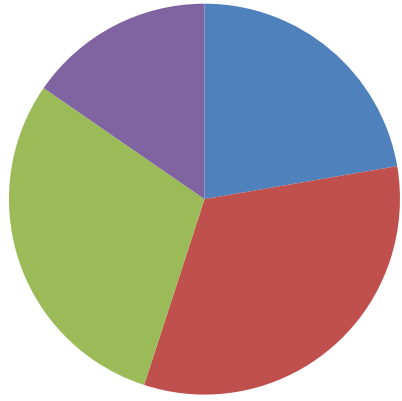
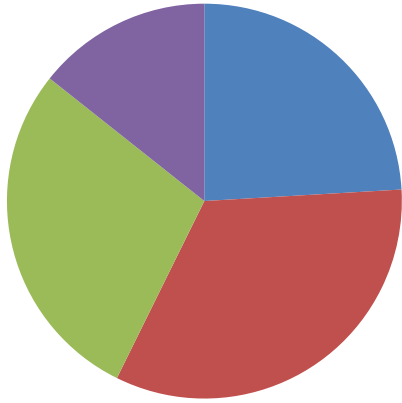
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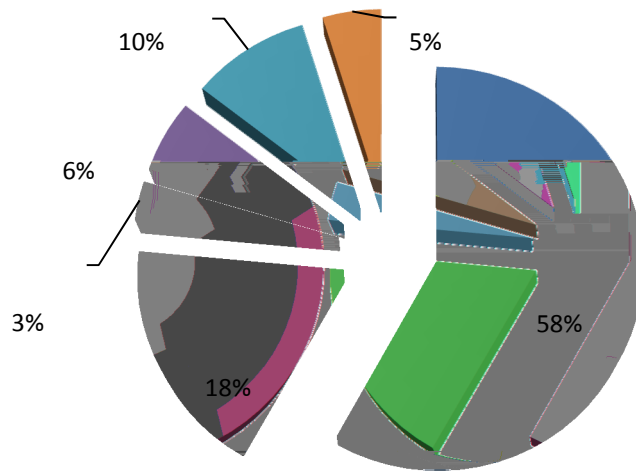
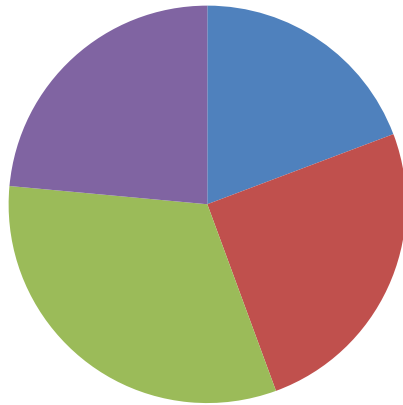
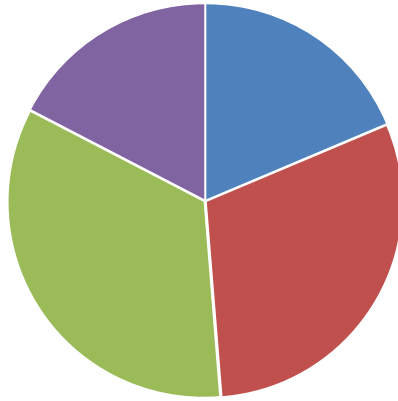
31.7%

68.3%

2016

8%



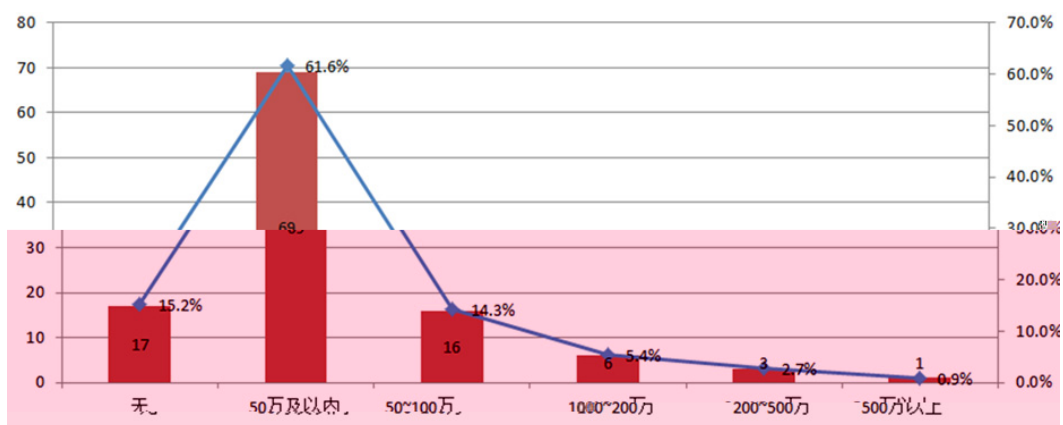


58%

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2016

2016

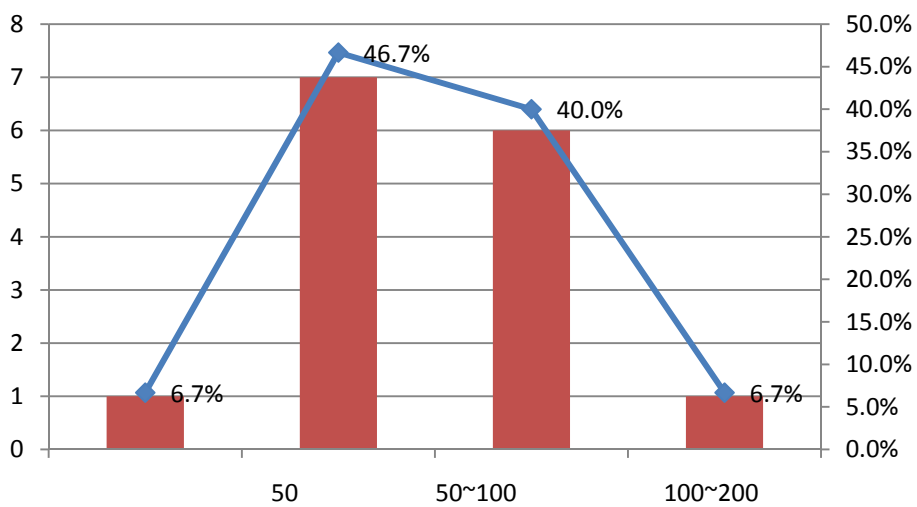


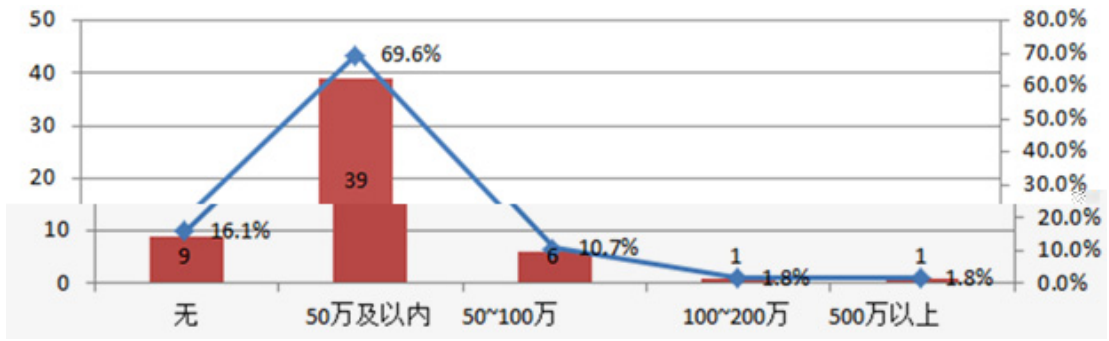
61.6%

50

14.3%

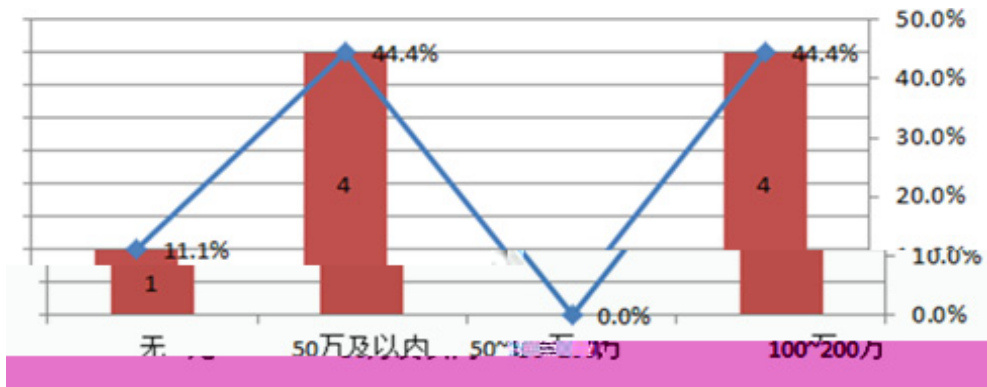
50 100





44%

100 200



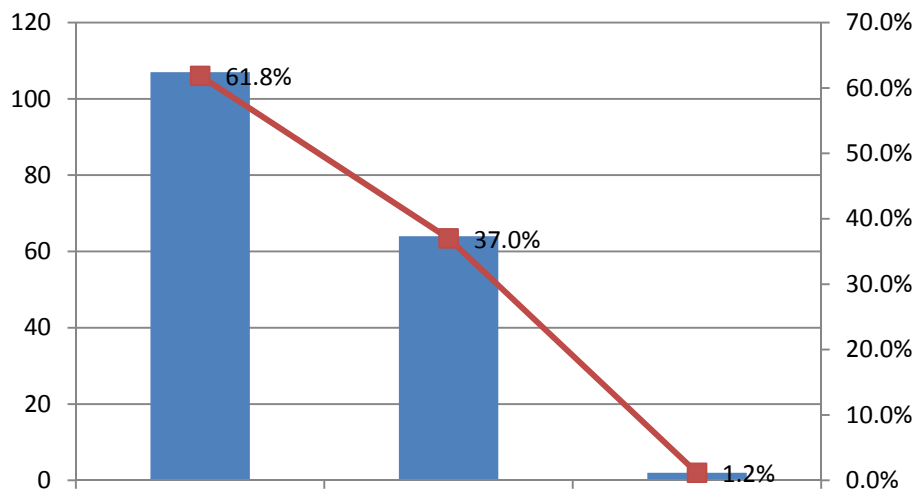
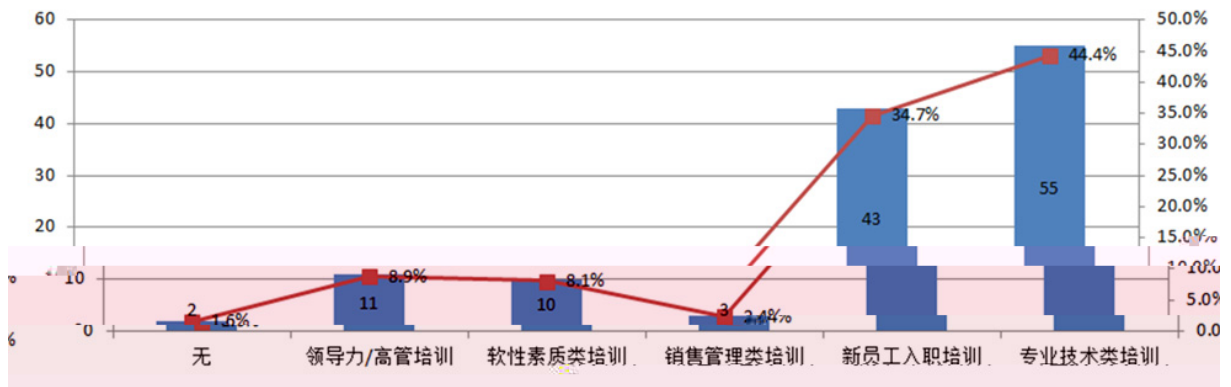
200

50

200

44.4%

34.7%

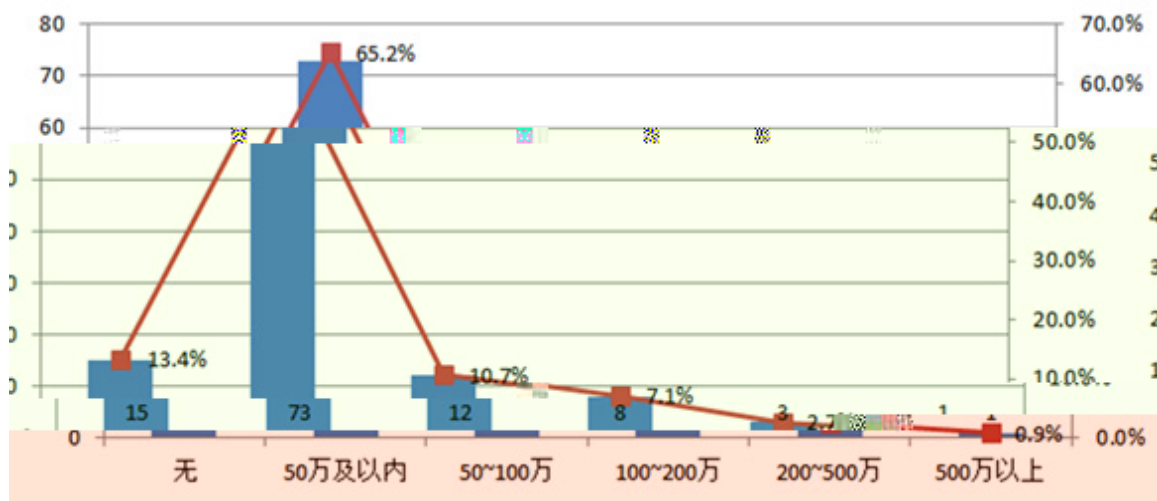


95.5%

57.1%

65.2% 50 10.7%

50 100 2016

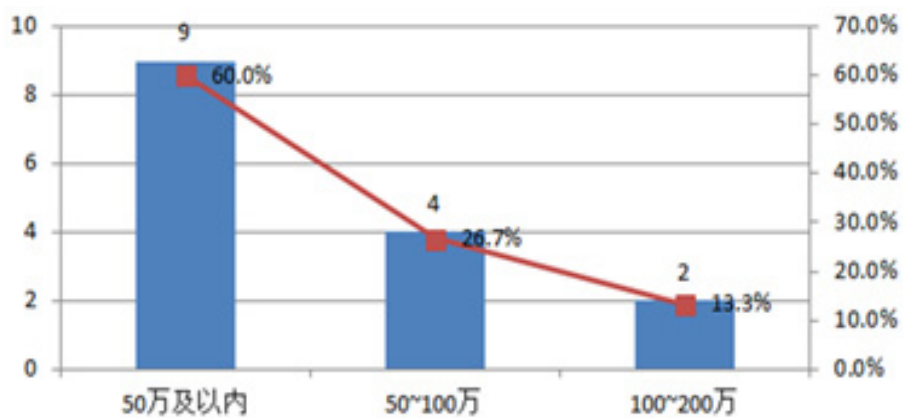


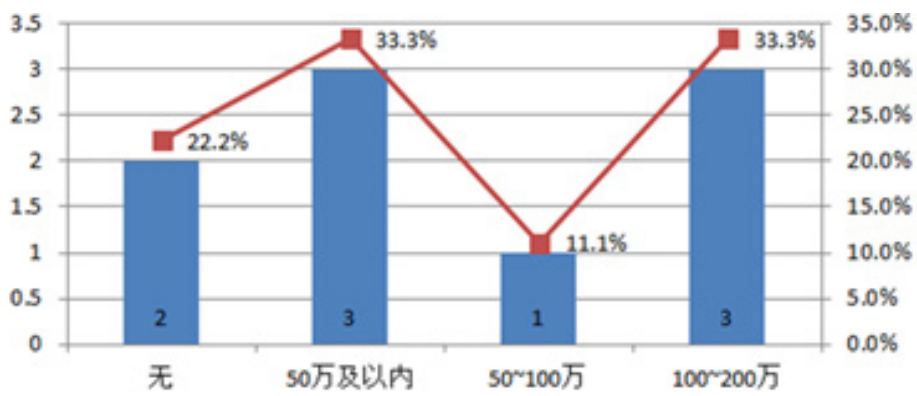
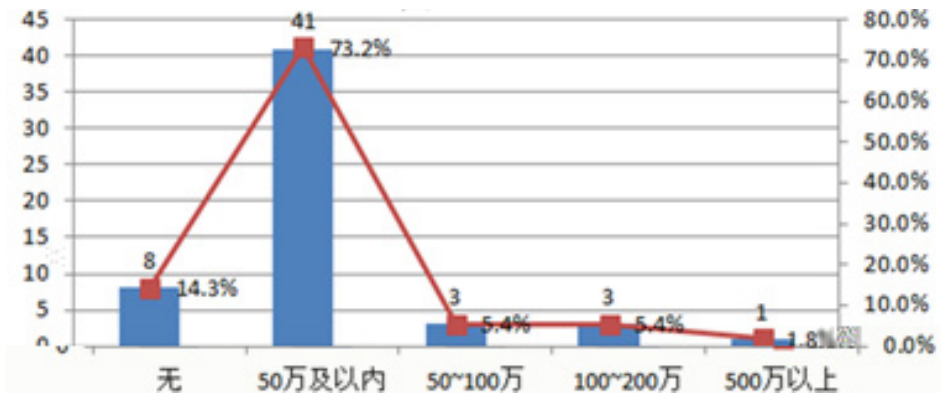
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2017

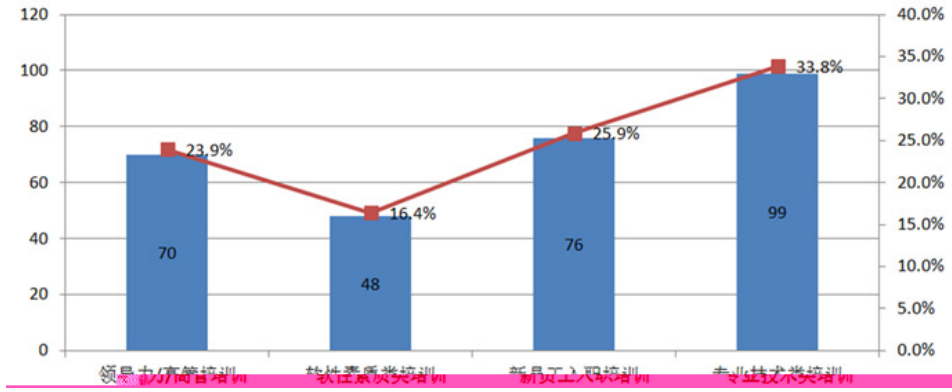
2017

2016





2016



133

9

17

985

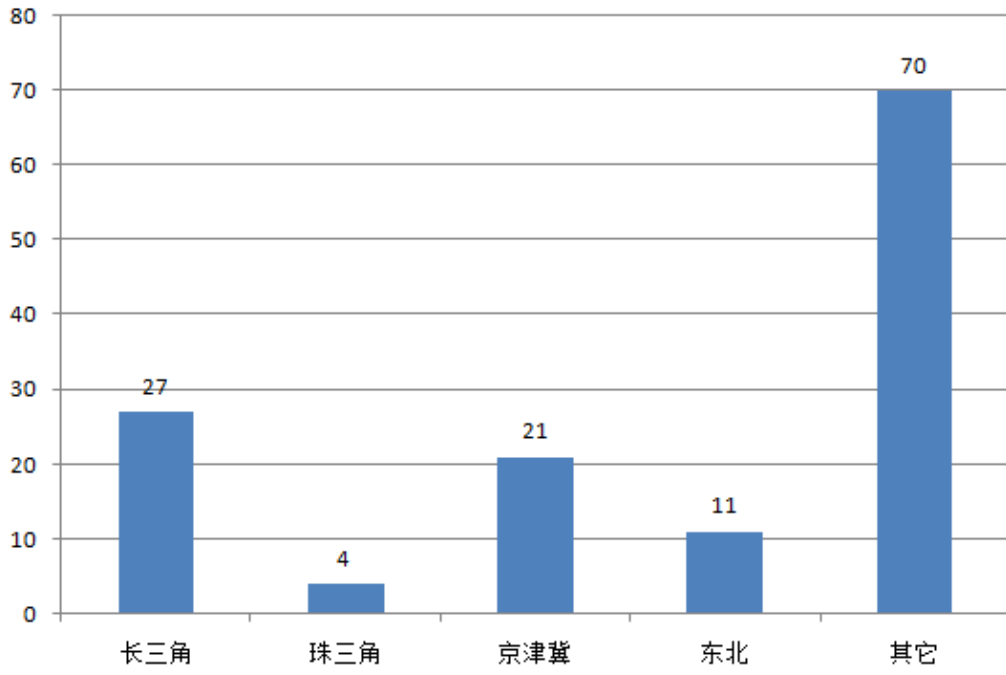
13

211

985

35

59

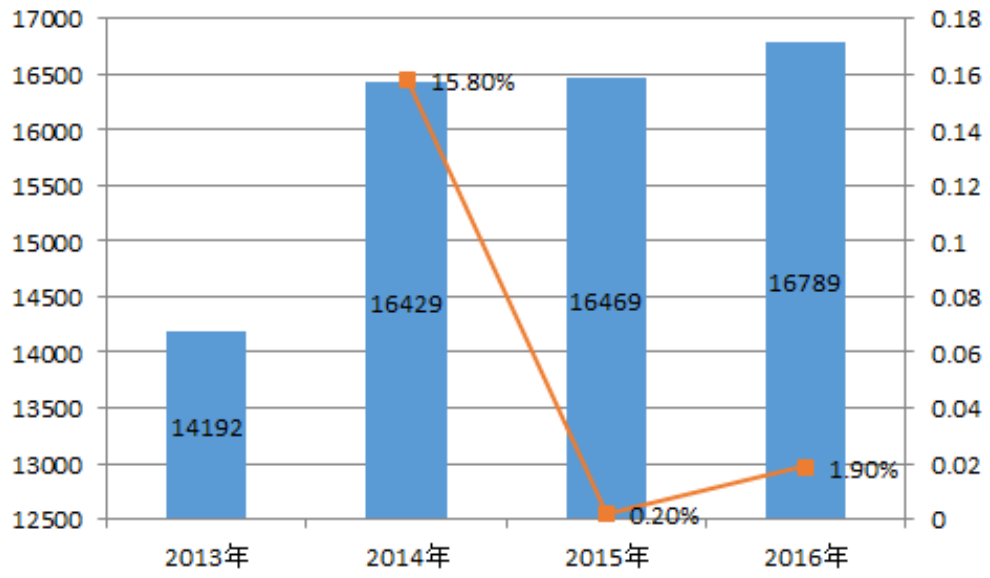


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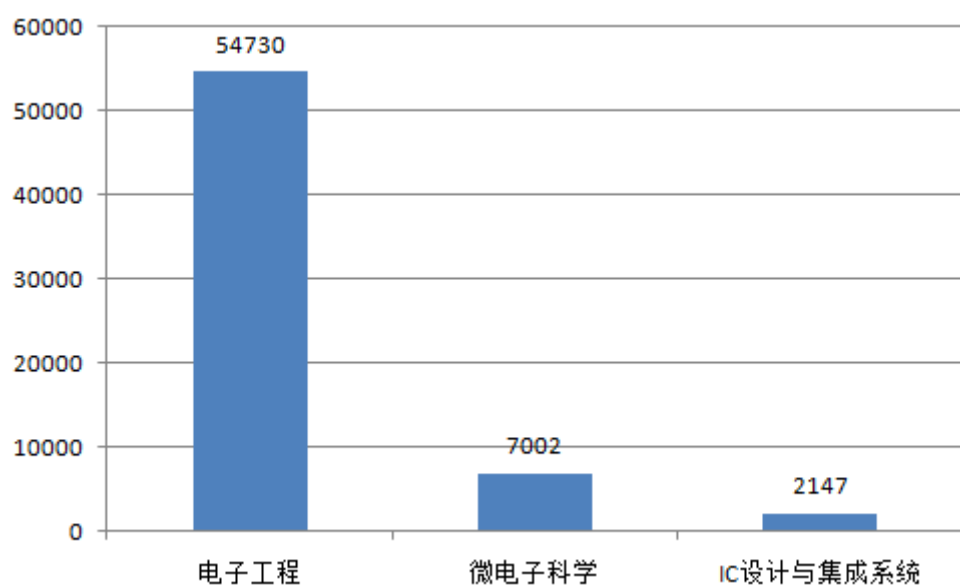
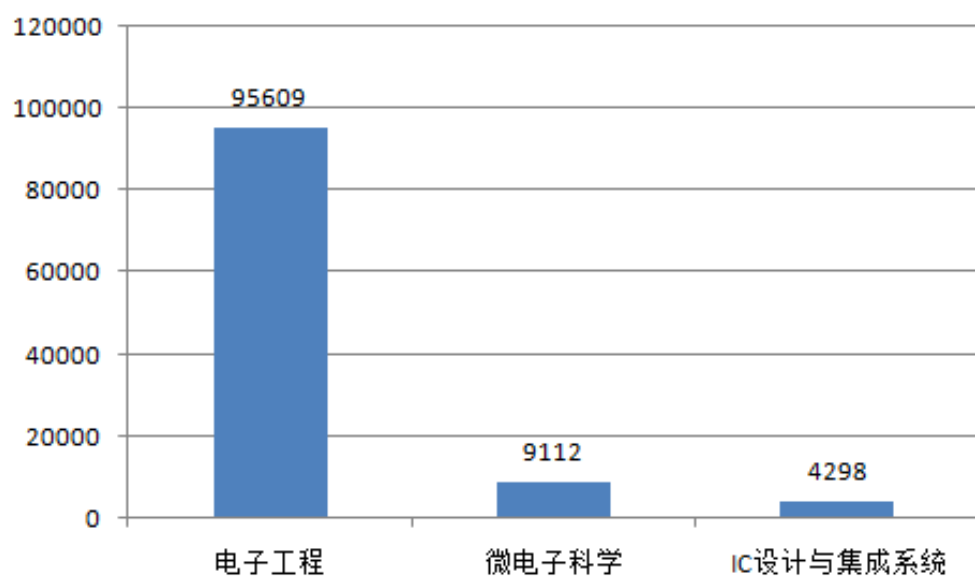


2013 2014 15.80%

2016 133

124

	2013	2014	2015	2016
	118	125	126	124
	24	25	29	23
	12	13	14	15



	/%	/	/%	/%	/%
	91.9	4643	51	79	59
	89.8	5211	55	78	53
	93.6	4313	53	81	71

-2016

2015

26

500

5000²

2016 26

589

666

2015

2

\					
			30-60		
				60-90	20-30
				15-20	2-5
			30	70	20
			400	150	50
			300	200	50
	VLSI +		60	140	60
			60		
				40	
					5
			200	100	15
			100	60	10
			200	100	10
			300	130	20
			81	25	3
			24	24	7
			50	20	10
			80	60	8
			30		
			120		
			70	33	1
				22	
				166	195
				217	

Synopsys Cadence Mentor

EDA

40

1-2

2016

XMC SMIC

58

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IP

1

<https://zhuanlan.zhihu.com/p/25801837>

2

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2016

3

<http://www.csia.net.cn/Article/ShowInfo.asp?InfoID=58419>

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5

2015